Installation and Registration
User Manual

EstateMaster
www.estatemaster.com

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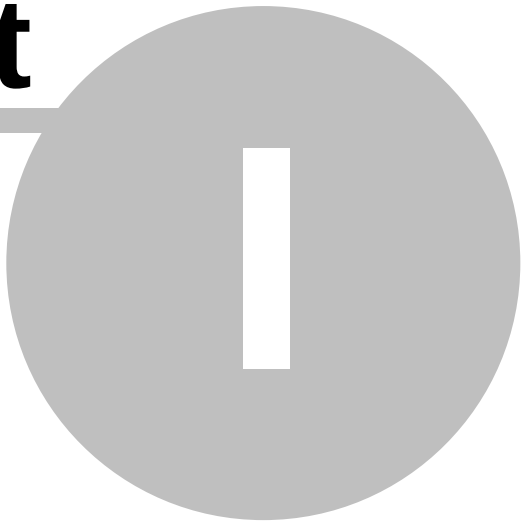
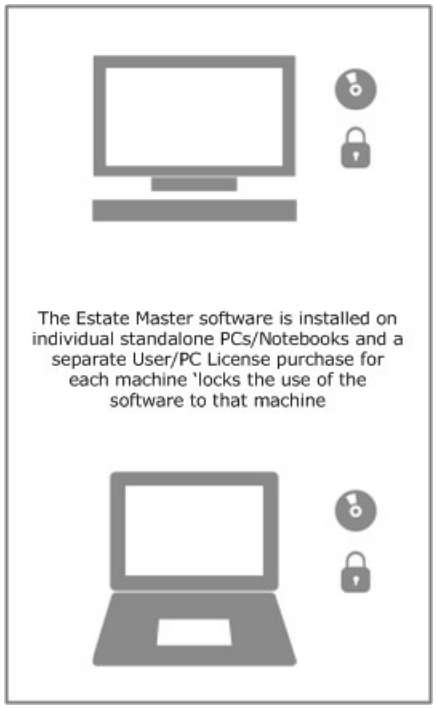
Part



1 Licence Types

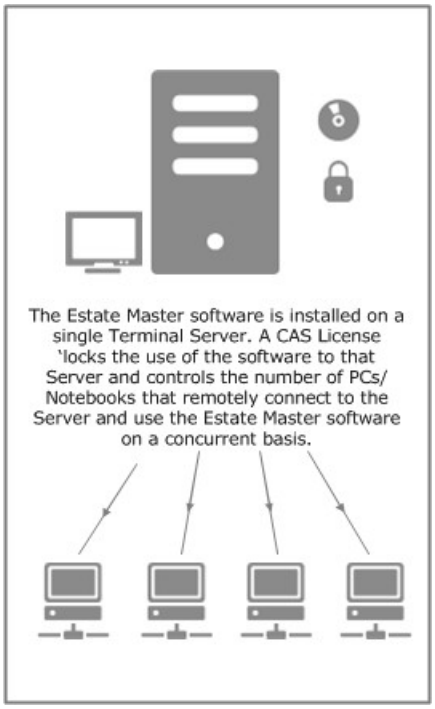
There are three (3) Licence Types available to use the Estate Master software:

User/PC Licence


The Estate Master software is installed on individual standalone PCs/Notebooks and a separate User/PC License purchase for each machine 'locks the use of the software to that machine

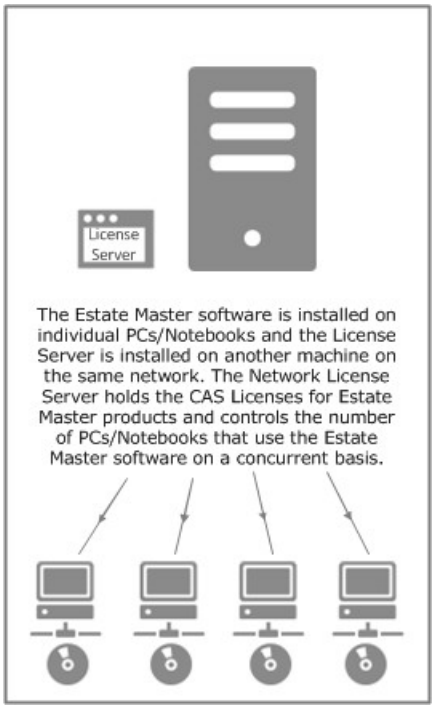
More Information

Terminal Server CAS Licence


The Estate Master software is installed on a single Terminal Server. A CAS License 'locks the use of the software to that Server and controls the number of PCs/ Notebooks that remotely connect to the Server and use the Estate Master software on a concurrent basis.

More Information

Client-Server (Floating) CAS Licence


License Server
The Estate Master software is installed on individual PCs/Notebooks and the License Server is installed on another machine on the same network. The Network License Server holds the CAS Licenses for Estate Master products and controls the number of PCs/Notebooks that use the Estate Master software on a concurrent basis.

More Information

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1.1 User/PC Licence (Standalone)

A **'User/PC License'** allows a single person to install, register and operate Estate Master on a single computer (desktop or laptop) only. Data files may be stored on the computer or on a server.

If more than one computer requires Estate Master to be installed and registered on it, whether for the same person (who holds a user licence on another computer) or for a different person, this constitutes an 'Additional User/PC Licence' and an additional fee is payable. For example, if a single person requires Estate Master on their PC, and also on their portable laptop, this constitutes two (2) User/PC Licenses.

This licence type is suitable for:

- Single users
- Small-medium organisations where all the users need access to the software very frequently.
- Small-medium organisations where there is no dedicated IT department or no server infrastructure to support the CAS Licences.

Important Note: User/PC Licences are only available for PCs/Notebooks and cannot be used on Servers.

Summary of USER/PC Installation and Registration Process		
1		User wants to use Estate Master on Computer A.
2		User purchases a User/PC licence either from the Estate Master website or contacting Estate Master Sales
3		On receipt of payment, a unique serial number is emailed to the user.
4		User downloads / installs Estate Master on Computer A and enters in the serial number provided to activate the licence. The licence is now 'locked' to Computer A.
5		User wants to use Estate Master on Computer B. User must complete steps 2 to 4 on Computer B.
6		Licensed users can now share Estate Master files over a network and store them on either a file server or the computer hard drive.

1.2 CAS Licence (Concurrent)

A **'CAS License'** (Concurrent Access Session) allows for the use of the Estate Master software by multiple users simultaneously on the same network. The number of CAS Licences determines the number of users that may operate Estate Master simultaneously via one of the methods below. For example, if a company has 3 CAS Licences and 3 users are currently operating the software, the 4th user will have to wait for another to close the software before they can open it. Additional CAS Licences can be acquired at any time to allow more concurrent users of the software.

There are 2 types of CAS Licences:

Terminal Server CAS Licence

The software is installed on a Terminal Server (e.g Microsoft Terminal Server, Citrix Server, etc) and the users access the software via a remote desktop connection. The server limits access to the software based on the number of CAS licenses.

This licence type is suitable for:

- Organisations where the users need access to the software infrequently and the licences can be shared between multiple users.
- Organisations that already operate other software applications via a Terminal Server to streamline application deployment and maintenance.
- Organisations that need their users to operate the software remotely from an offsite location such as home, construction site, etc.

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Important Note for Terminal Server Farms: Organisations that have a Terminal Server Farm must use the Client-Server (Floating) CAS Licence option, instead of the Terminal Server CAS Licence.

Summary of TERMINAL SERVER CAS Installation and Registration Process		
1		Company wants to install Estate Master on a Terminal Server so their staff can use the software on multiple computers concurrently.
2		Company purchases a 'Terminal Server' CAS licence either from the Estate Master website or contacting Estate Master Sales. They must nominate that a 'Terminal Server' CAS is required.
3		On receipt of payment, a unique serial number is emailed to the Company.
4		Company downloads / installs Estate Master on the Terminal Server and enters in the serial number provided to activate the CAS licence. The licence is now 'locked' to that Terminal Server
5		Any computer connected to the Terminal Server can now operate Estate Master via a Remote Desktop Connection.
6		Once the CAS limit is reached on the Terminal Server, the next user must wait for another user to exit Estate Master before they can operate it.
7		If additional Terminal Server CAS are required to allow for more simultaneous users to access the software, the Company can contact Estate Master Sales to purchase a new Serial Number.

Client-Server (Floating) CAS Licence

This is also known as a 'Floating Network' licence. The software is installed on individual computers. A Licence Server application is installed on another machine on the same network to control access to the software on the individual computers based on the number of CAS licenses for each Estate Master product.

This licence type is suitable for:

- Organisations where the users need access to the software infrequently and the licences can be shared between multiple users.
- Organisations that wish to wish have concurrent licensing options but do not have a Terminal Server.
- Organisations that have a Terminal Server Farm.

Summary of CLIENT-SERVER CAS Installation and Registration Process		
1		Company wants to install Estate Master on on multiple computers so their staff can use the software concurrently. Not all staff will always use the software at the same time and they do not have a Terminal Server.
2		Company purchases a 'Client-Server' CAS licence either from the Estate Master website or contacting Estate Master Sales. They must nominate that a 'Client-Server' CAS is required.
3		On receipt of payment, 2 unique serial number are emailed to the Company: 1. A Serial Number to register the Estate Master software on all the client computers. 2. A Serial Number to activate the Licence Server.
4		Company first downloads / installs the Licence Server on a machine on the same network and enters in the serial number provided to activate the Licence Server licence. The licence is now 'locked' to that machine and the Licence Server can now be started.
5		Company then downloads / installs the Estate Master software on all the computers that will be potentially needing the software and enters in the serial number provided to register that computer to use that software.
6		Any computer on the same network as the Licence Server can use one of the CAS Licences (as long as the computer has the Estate Master software).
7		Once the CAS limit is reached on the Licence Server, the next user must wait for another user to exit Estate Master before they can operate it.

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8 If additional Client-Server CAS are required to allow for more simultaneous computers to access the software, the Company can contact Estate Master Sales to purchase another Serial Number.

Important Note for using a Floating Licence over a WAN: The Client-Server (Floating) CAS Licence uses UDP Broadcasting to establish a communication with the Network Licence Server and the client machines running Estate Master. Over a WAN/VPN, these broadcast messages typically are not received by the server due to network configurations blocking this type of communication (e.g. firewalls, routers, etc). A Licence Server Finder utility is available to manually specify the IP address of your server in this scenario, which may resolve this issue in most cases.

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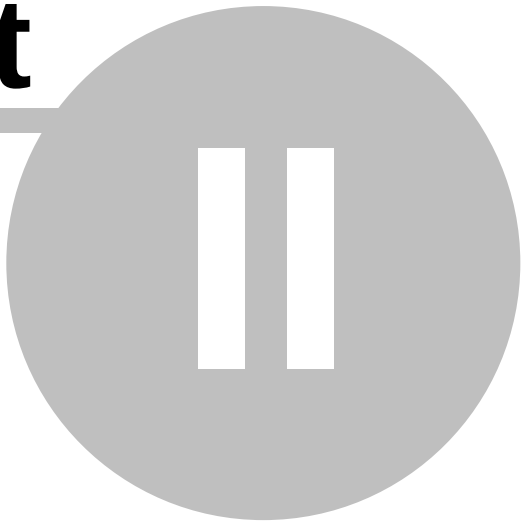
Part



2 Installation

Pre-installation Checklist

✓ The software can only be installed and registered by a person who has Administration rights for that PC/Notebook/Server.

✓ The administrator must install and complete the registration of the software on behalf of the user.

✓ The installation and registration process must be completed on each PC/Notebook/Server that you intend to use Estate Master on. You can not complete the registration process on one computer on behalf of another.

Summary of Installation Requirements

The following tables summarises what software needs to be installed where for each type of licence.

Licence Type	Estate Master Software and Prerequisite Software	Network Licence Server
User/PC Licence	• .Net Framework and Estate Master Software installed on individual PC/Notebooks • Cannot be installed on a Server • SQL Server installed on a central server (only required if using the Enterprise Database)	• Not required
Terminal Server CAS Licence	• .Net Framework and Estate Master Software installed on a single Terminal Server • Remote Desktop Clients (e.g PCs/Notebooks) do not need any software • SQL Server installed on a central server (only required if using the Enterprise Database)	• Not required
Client-Server (Floating) CAS Licence	• .Net Framework and Estate Master Software installed on individual PCs/Notebooks/ Servers • SQL Server installed on a central server (only required if using the Enterprise Database)	• Licence Server installed on any single machine on the same network as the individual PCs/ Notebooks/Servers that have the Estate Master Software installed.

Next Steps

Installing Prerequisite Software

Installing the Estate Master Software

Installing the Estate Master Network Licence Server (for Client-Server CAS Licences only)

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2.1 Installing Prerequisite Software

To streamline the installation process, please make sure the following prerequisite software is installed on the PC/Notebook/Server before attempting to install Estate Master:

- Microsoft .Net Framework 3.5
- Microsoft SQL Server 2005 or 2008 (Standard or Express Editions) (only if using the Enterprise Database)

It is recommended that the prerequisite software be downloaded from Microsoft's Download Centre to ensure that the latest versions are installed.

Next Steps

Installing the Estate Master Software

Installing the Estate Master Network Licence Server (for Client-Server CAS Licences only)

2.2 Installing the Estate Master Software

Installing from Disc

Place the Estate Master CD into the drive and wait for the installation program to automatically load.

Installing from Download

After downloading the Setup file from the Estate Master web site and saving it on your PC, run the file by double-clicking it.

1. If you have not already done so, the setup process may prompt you to install the prerequisite software.
2. Follow the prompts to install the Estate Master program on the PC/Notebook/Server.
3. The following will be added to the Windows Program list:
   - Check for Updates: A utility to check if there are any updates for the Estate Master product online that can be downloaded.
   - Estate Master <product name>: The main Estate Master application.
   - Operations Manual: A PDF version of the software manual.
   - Sample File: A file with sample data.

Next Steps

Installing the Estate Master Network Licence Server (for Client-Server CAS Licences only)

2.3 Installing the Network Licence Server

If using a Client-Server CAS Licence ('Floating' licence), you will need to install the Network Licence Server application on a specific machine on the network so it can control the usage of the software licenses across a network. It can be either a PC or Server, but preferably a machine that is always

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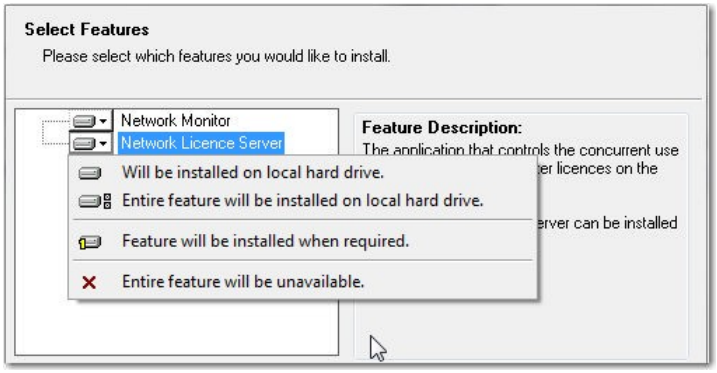
powered on and is accessible by all other machines requiring to run Estate Master using this licence type.

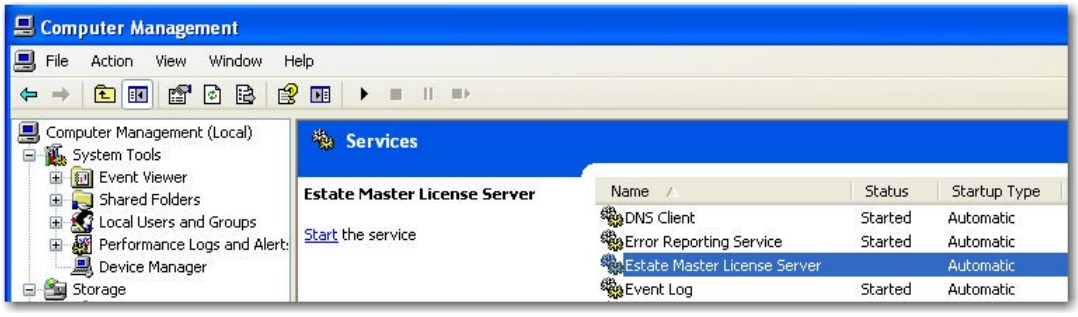
Installing from Download

After purchasing a Client-Server CAS Licence, you will be emailed a link to download the Network Licence Server. Alternatively, you can download it directly from here. After downloading the Setup file and saving it on your PC, run the file by double-clicking it.

1. If you have not already done so, the setup process may prompt you to install the prerequisite software.
2. Follow the prompts to install the Estate Master Network Licence Server on the PC/Notebook/ Server. You will be given the option to install the following features (by default, all features will be installed) :
    - The Network Monitor: The user-interface for the Network Licence Server. This utility allows you to stop/start the Network Licence Server service, see who is actually using the software on the network and check how many available licences for each product there are. The Network Monitor can also be installed on other machines (in addition to the machine that has the Network Licence Server service running on it) if you wish to monitor Estate Master licence usage from several locations.
    - The Network Licence Server: The application that controls the concurrent use of the different Estate Master licences on the network. Only 1 Network Licence Server can be installed on a network.


Select Features
Please select which features you would like to install.
Network Monitor
Network Licence Server
Will be installed on local hard drive.
Entire feature will be installed on local hard drive.
Feature will be installed when required.
Entire feature will be unavailable.
Feature Description:

3. Towards the end of the installation process, the registration form to activate the Network Licence Server will appear. If you have the registration details available, enter them in the form and click on [Register]. Alternatively, click on [Cancel] and complete the process later, however please bear in mind, you will not be able to 'start' the Network Licence Server until it has been registered.
4. Once installation is complete:
    - The Network Licence Server (if that feature has been selected to be installed) will be then added as a Windows Service (set on 'Automatic' startup type) waiting to be 'started'.
    - The Network Monitor (if that feature has been selected to be installed) will automatically appear so you can 'Start' the Network Licence Server.



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5. In addition, the following will be added to the Windows Program list:

   - Network Monitor: The user-interface for the Network Licence Server.
   - Registration: The registration form for the Network Licence Server. If you did not register the licence in Step 3, then you can click on this to load the registration form at a later date. It also allows you to deactivate an active Network Licence Server licence so you can transfer the Network Licence Server from one machine to another.

Important Note: Only 1 Network Licence Server can be installed on a network. There are checks in place to ensure that no more than 1 Server is installed, however as a precautionary method, if any of the Estate Master products attempt to detect a Server when they load and more than 1 is found, the following error will be displayed and the user will not be able to use the Estate Master software until all the superfluous servers are uninstalled.

Estate Master IA
The Estate Master Network Server was not found
This application requires only one Estate Master Network service to be running on your network.
This was not found.

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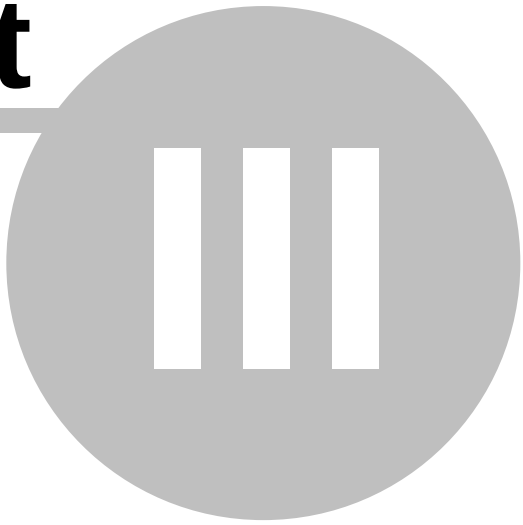
Part

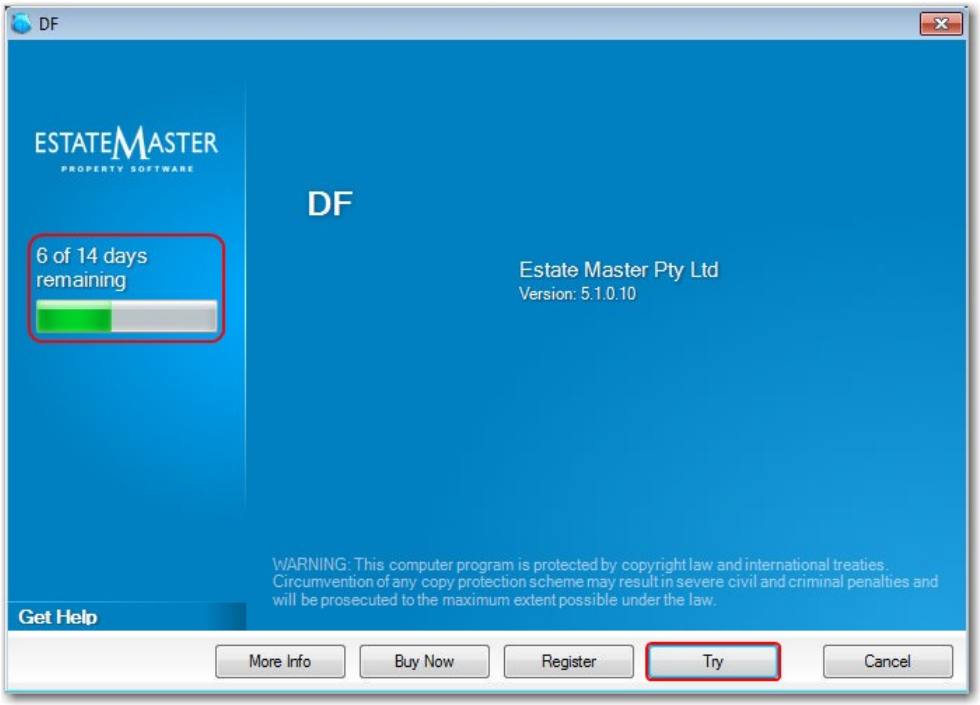


3 Evaluating the Software

Once the Estate Master software has been installed on a PC/Notebook/Server, it will be operational for a period of **14 days** for evaluation purposes, until a valid serial number needs to be used to activate the licence.

To evaluate the software, just run it after it has been installed and the following screen should appear:

- You can check the number of days remaining in the evaluation period
- You can click [Try] to continue using the software. If 'Try' is disabled, then the evaluation period has expired.


DF
ESTATEMASTER
PROPERTY SOFTWARE
6 of 14 days remaining
DF
Estate Master Pty Ltd
Version: 5.1.0.10
WARNING: This computer program is protected by copyright law and international treaties. Circumvention of any copy protection scheme may result in severe civil and criminal penalties and will be prosecuted to the maximum extent possible under the law.
Get Help
More Info
Buy Now
Register
Try
Cancel

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Part IV

4 The Estate Master Software

4.1 Registration and Activation

When purchasing any of the different types of licences, a Serial Number(s) will be provided to 'Register' the Estate Master software (i.e DF, DM, etc) on the PCs/Notebooks/Servers that will be running the software.

- For **User/PC** Licences:
  - The Estate Master software will be 'registered' on the standalone PCs/Notebooks
- For **Terminal Server CAS** Licences:
  - The Estate Master software will be 'registered' on the Terminal Server
- For **Client-Server (Floating) CAS** Licences:
  - The Estate Master software will be 'registered' on the networked PCs/Notebooks.
  - **Important Note:** Before attempting to register these networked PCs/Notebooks in a Client-Server (Floating) CAS scenario, the Network Licence Server needs to be installed and registered first otherwise the networked PCs/Notebooks will fail in their registration process.

Internet Connectivity Requirements

- During the 'registration' process, it will also attempt to verify the serial number with the Estate Master Online Licence Database and then 'activate' the licence.
- An outbound connection needs to be made to the following URL to confirm the licence: http://clients.estatemaster.net:80/webservices/
- If it cannot activate online during this process (e.g no internet connection or something blocking the connection), the user will have to activate their software via the offline method within 14 days or 15 uses from 'registering' (whichever comes first) .

How to Register and Activate

1. On the first screen in the registration process, click on [Register]

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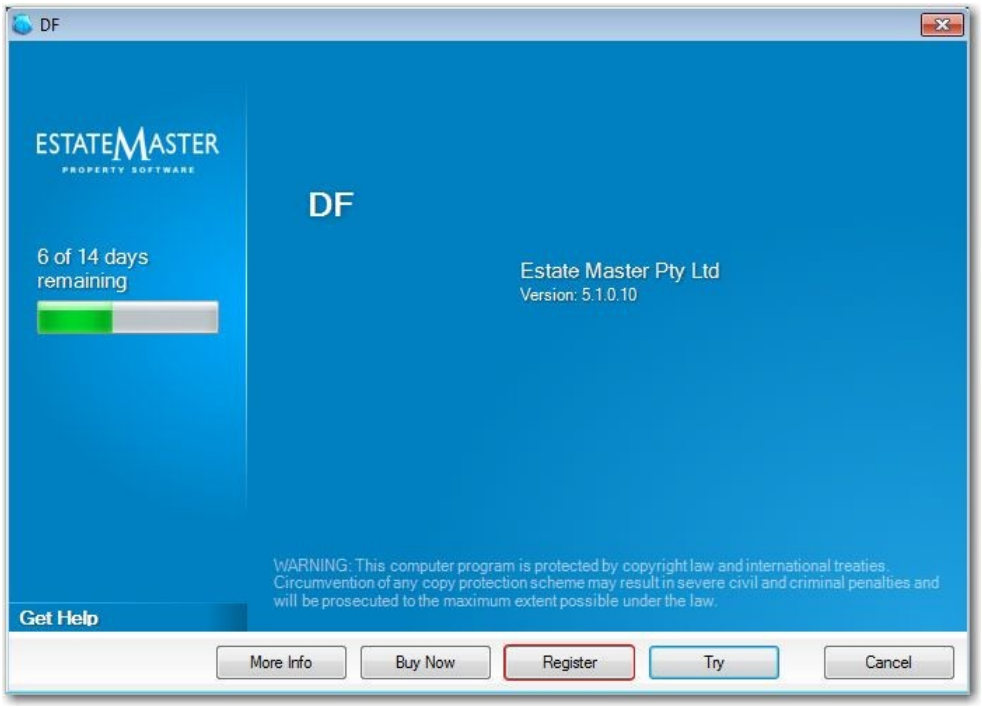
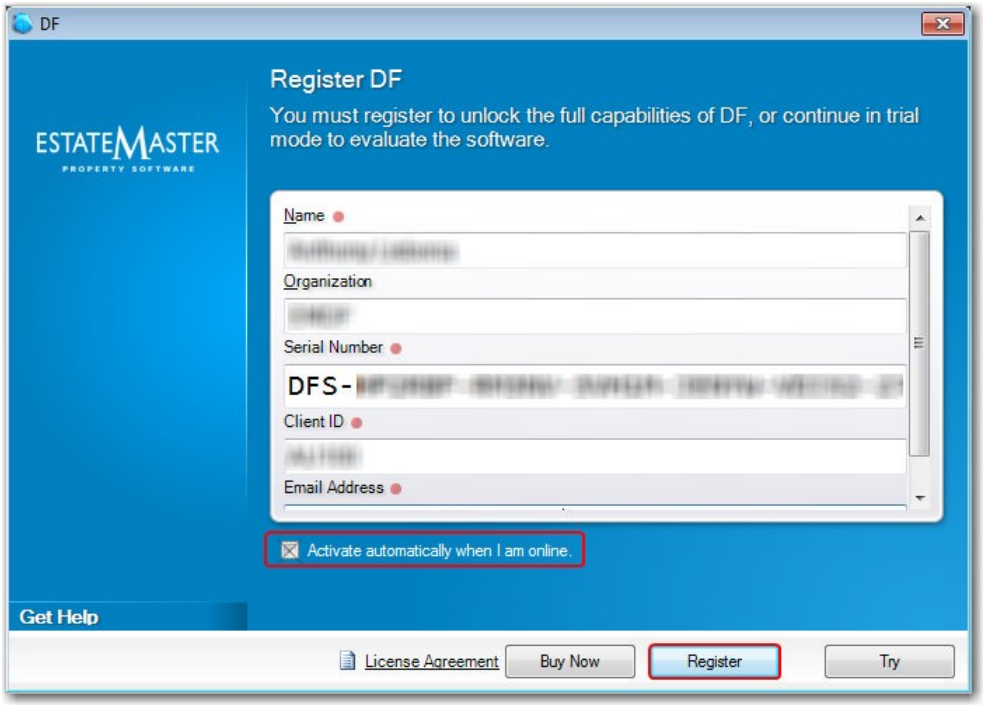

DF
ESTATEMASTER
PROPERTY SOFTWARE
6 of 14 days remaining
DF
Estate Master Pty Ltd
Version: 5.1.0.10
WARNING: This computer program is protected by copyright law and international treaties. Circumvention of any copy protection scheme may result in severe civil and criminal penalties and will be prosecuted to the maximum extent possible under the law.
Get Help
More Info
Buy Now
Register
Try
Cancel

2. On the next screen, enter in the registration details and click [Register]

   Hint: For faster activation, select 'Activate Automatically when I am online'



3. The software will then attempt to contact the online licensing server. If you selected 'Activate Automatically when I am online' in step 2, then it will then attempt to activate at the same time.

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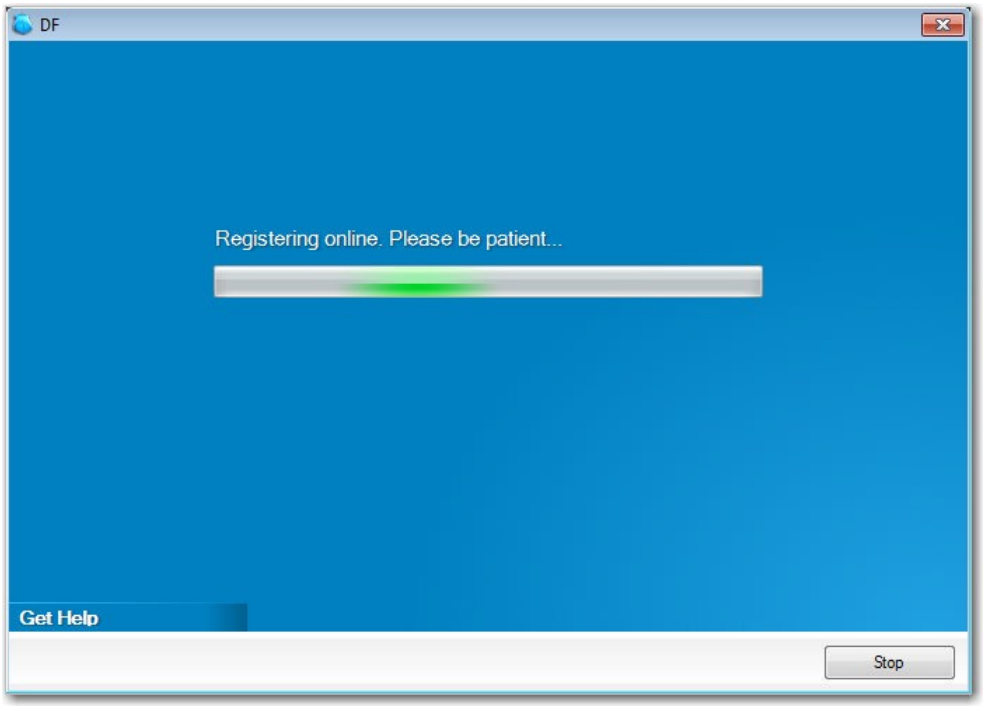

The Software is now REGISTERED

4. If no internet connection is available to complete the online activation, or you did not select 'Activate Automatically when I am online' in step 2, then the following screen will appear. You will then need to complete the 'Offline Deactivation' process.

DF
ESTATEMASTER
PROPERTY SOFTWARE
14 of 14 days remaining
15 of 15 uses remaining
Activate DF
To continue you must activate which verifies that you are using a fully licensed version of the software.
Give this machine a nickname to help you remember where you've installed the software.
Activate Over the Internet
Activate by Entering a Code
Try a different serial number
Some features may be disabled or reduced until you complete activation.
More about Activation
Get Help
License Agreement
Activate Later
Cancel

5. If the licence was successfully activated, it will check to see if any updates to your licence is required (e.g changes to your company name, etc). If there are, then the following message will appear.

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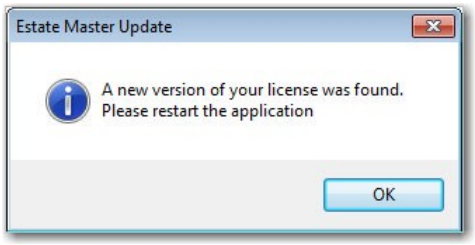

The Software is now ACTIVATED

Important Note:

For **User/PC** Licences and **Terminal Server CAS** Licences:

- The licence will need to be 'activated' - that is, 'locked' to a specific machine.

For **Client-Server (Floating) CAS** Licences:

- Activation is not required, as the licence is not 'locked' to specific machines.
- The Network Licence Server has its own licence that needs to be activated, but the actual licences for the different Estate Master products that it monitors and controls on the separate PCs/Notebooks, only need to be 'registered' (i.e the Serial Number entered in for each PC/Notebook) .

Adjusting your Proxy Settings

If the online activation process detects that a proxy server is blocking communication between the Estate Master software and the online database and it detect your proxy settings successfully, then the following screen will appear to allow you to enter in your proxy settings.

Internet Proxy Configuration
There was a problem connecting to the server that may be due to a proxy configuration error. Please enter your proxy information to try again.
Proxy Server Address
http://
Credentials
Username
Password
Contact your network administrator for help with these values.
OK
Cancel

If the Proxy Configuration form continues to appear after attempting to enter in the correct credentials, you can try and set the following URL in your Firewall/Proxy exception list: http://clients.estatemaster.net/*

Viewing your Licence Details

To view your licence details at any time once the software has been activated, following these steps:

1. Go to the Application Menu and select [Help] > [About Estate Master <*product name*>]

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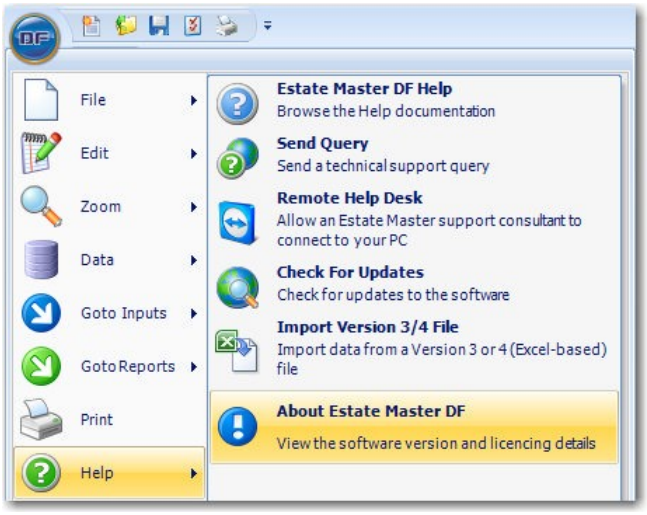
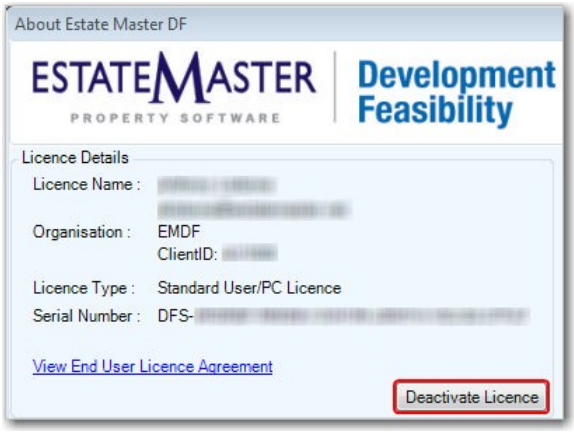


2. The following screen will appear that displays the existing licence details. Until the Licence has been 'activated', then this screen will just display the text "Trial Licence"



4.1.1 Offline Activation

The registration and activation process requires an internet connection to authorise the licence online. If there is no internet connection, or a firewall/proxy server is blocking the connection, the following screen may appear during this process. Two options will then be available to the user to activate their software within 14 days or 15 uses (whichever comes first):

1. Activate over the internet.
2. Activate by entering a code.

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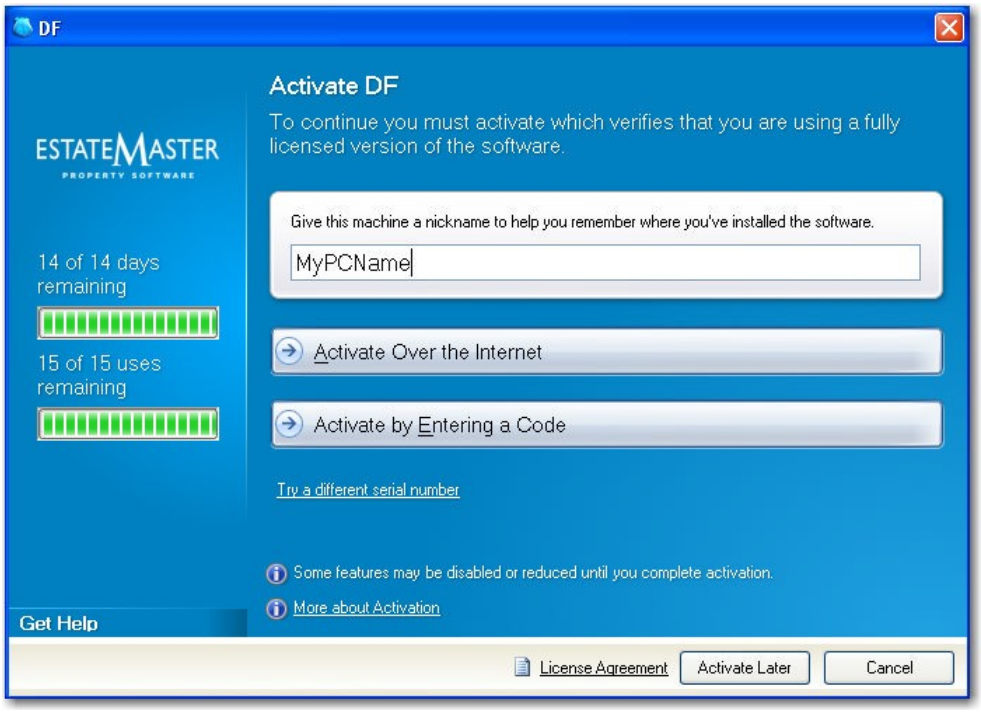

DF
Activate DF
To continue you must activate which verifies that you are using a fully licensed version of the software.
ESTATEMASTER
PROPERTY SOFTWARE
Give this machine a nickname to help you remember where you've installed the software.
MyPCName
14 of 14 days remaining
15 of 15 uses remaining
Activate Over the Internet
Activate by Entering a Code
Try a different serial number
Some features may be disabled or reduced until you complete activation.
More about Activation
Get Help
License Agreement
Activate Later
Cancel

Activate Over the Internet

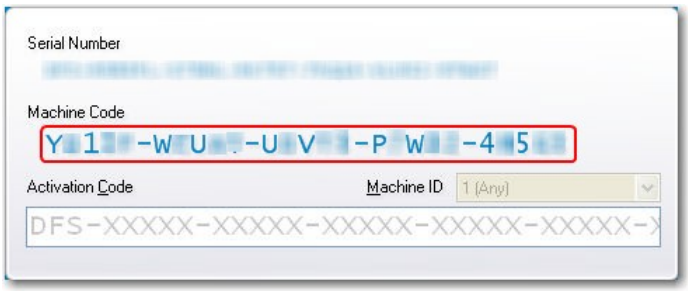
To try and activate the licence over the internet again, firstly check your internet and network settings to ensure there is no issue with them, then click on [Activate Over the Internet] again. If there are still errors while activating, you will need to 'Activate by entering a code'

Activate by Entering a Code

Important Note: Offline Activation codes are only available for clients with a valid Annual Support and Software Assurance contract.

To obtain an offline activation code, follow these steps:

1. When the above screen appears during the registration process, click on [Activate by Entering a Code]. You will be given a 'Machine Code' on the following screen.



2. Go to the Estate Master website www.estatemaster.com
3. Once logged in, click on the [Client Area] button and log in using your Client ID and Password.

   Important Note: If for some reason you have any issues in logging into the the Client Area of the website to complete this process, please contact an Estate Master Support Consultant.

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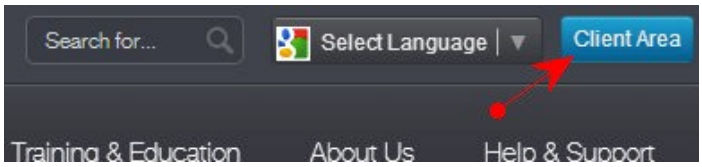
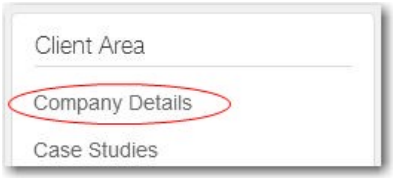
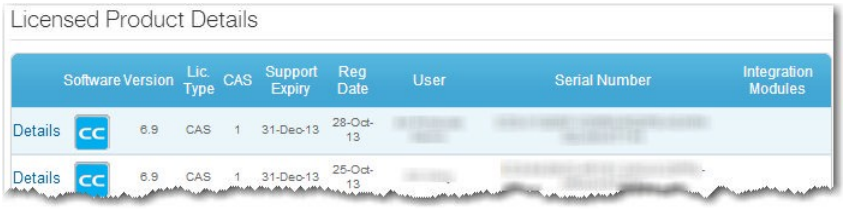


4. In the navigation menu, click on [Company Details]



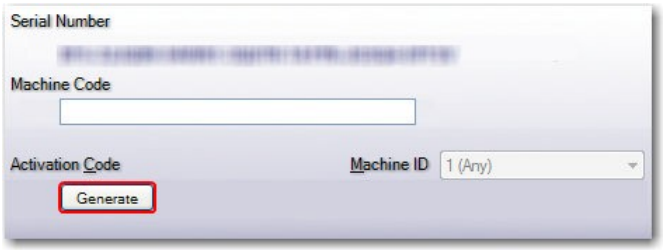
5. Scroll to the the 'Licensed Product Details' table, and select the license that you wish to obtain an offline activation code for by clicking on the [Details] button.



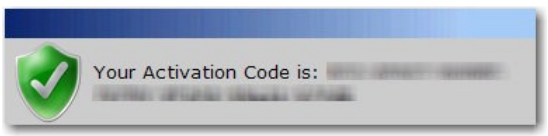
6. The details for that particular license will be displayed in a table. Below the table, click [+] to expand and display the 'Offline Activation Code' information.

7. It will display a mock-up of the registration screen (as per screenshot below).

   Important Note: Before proceeding further, ensure that the Serial Number displayed here is exactly the same as the Serial Number displayed on the registration form in step 1. If they are different, you are trying to obtain an offline activation code for the wrong licence.



8. Enter the 'Machine Code' that was displayed in step 1, and click on the [Generate] button.
9. You will then be asked to pick the nominated user for this licence from a list, or create a new user.
10. An activation code will then be displayed to you on the website.



11. Back on the registration screen, enter this code in the registration form in step 1 and click [Activate]

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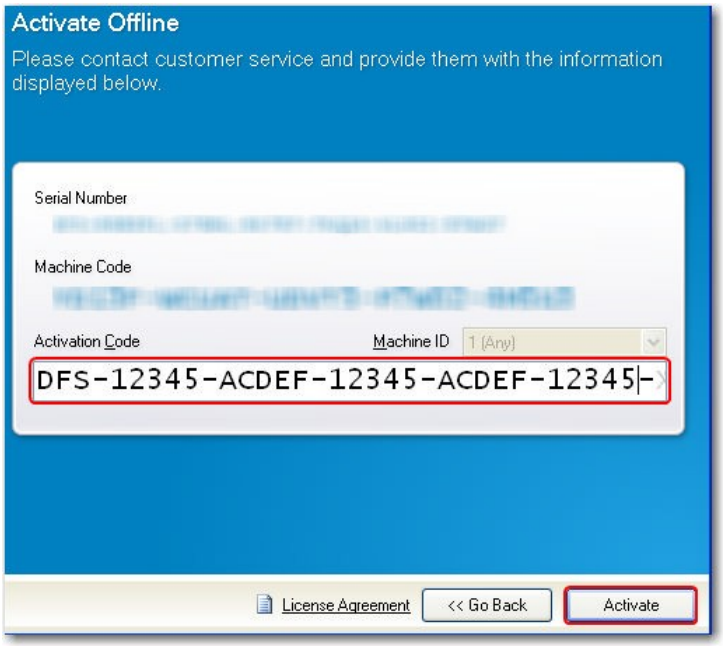
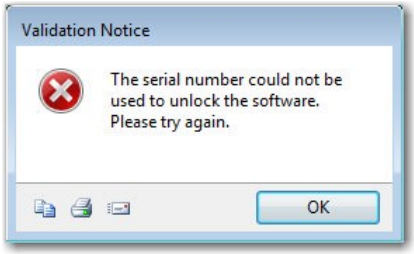


4.1.2 Troubleshooting Errors

If the Registration and Activation process fails for a particular reason, a message will appear with the reason of the failure.

Errors during Registration and Activation

As soon as the [Register] button is clicked, the first thing that will be checked is the validity of the serial number used. If the following error message is displayed, it usually means that the serial number entered is not for that particular Estate Master product (e.g. you are using a DM serial number to try and register a DF licence).



To check that you have the correct serial number for the Estate Master product, the first 2 letters of the number should be the same as the product name (e.g for Estate Master DF serial numbers, they should start with 'DF.....')

If the serial number validity check has passed, then an issue may arise during the online activation process. This will be indicated by one of the following screen:

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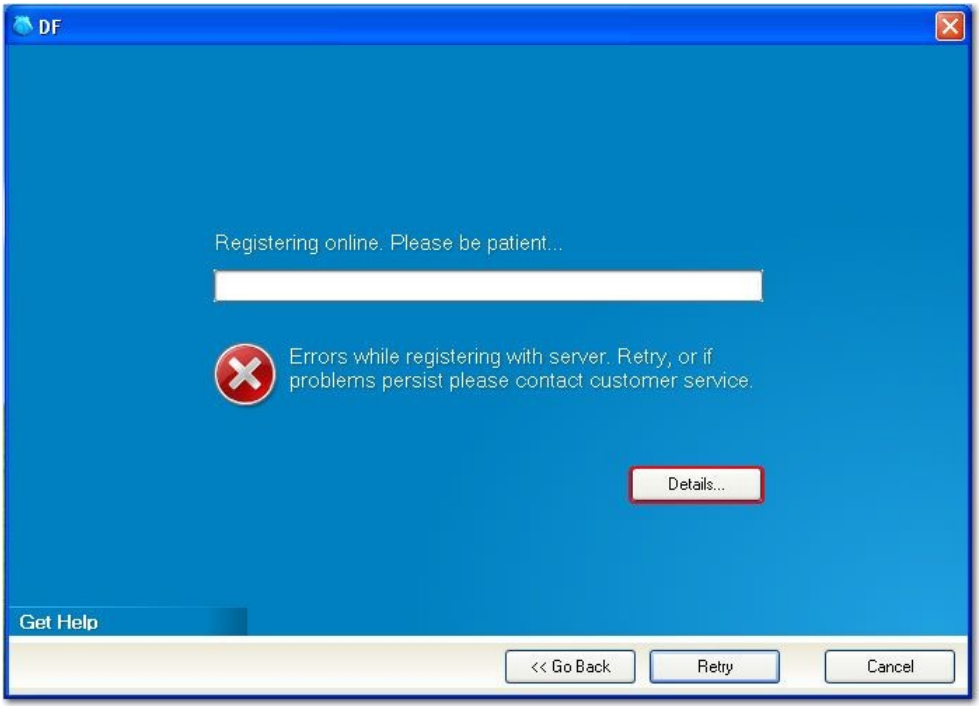

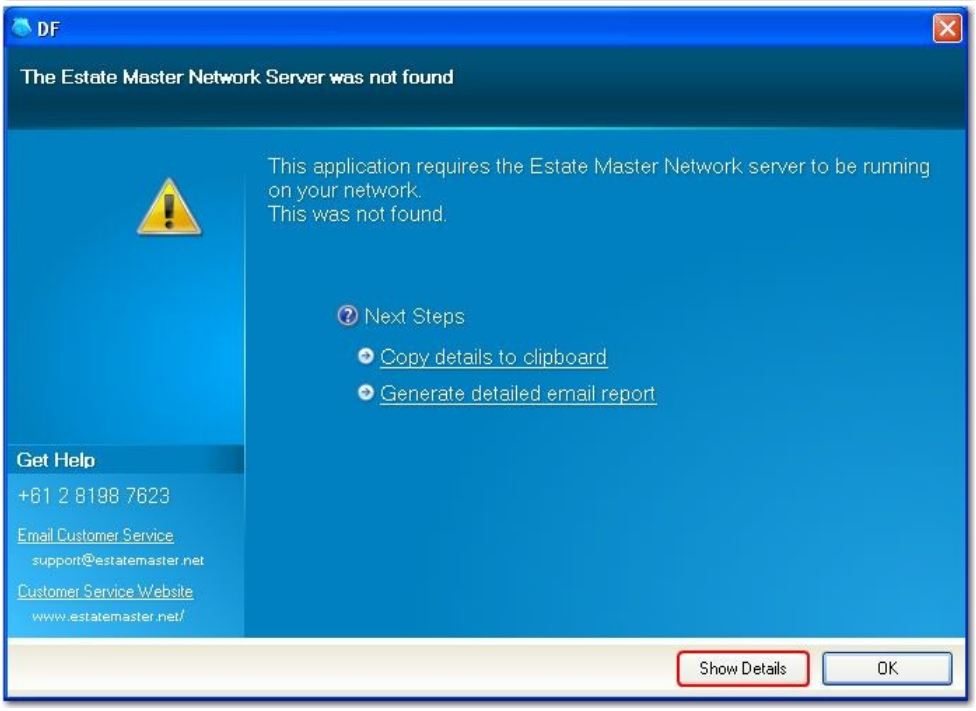

If you click on [Details] or [Show Details], additional information will be provided:

Error	Causes and Resolutions
Could not register license. Could not register with the server. Cannot match the Serial Number with the specified Client ID. Please try again or call Estate Master for assistance.	Cause • The incorrect ClientID has been entered in the registration form • The Serial Number doesn't exist for that Client ID in our database. Resolution • Check that the correct ClientID was entered in the registration form.

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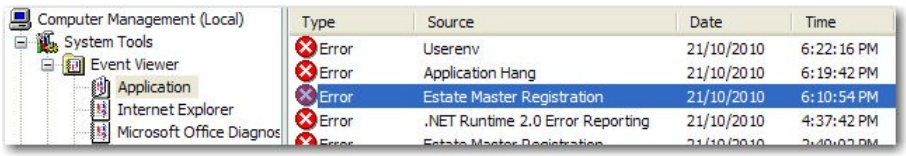
Could not register license. Could not register with the server. The Serial Number entered is currently Inactive. Please try again or call Estate Master for assistance.	Cause • The Serial Number has been marked as 'Inactive' in our database. Resolution • Contact Estate Master Support
Could not register license. Could not register with the server. This version is newer than the allowed version of the software	Cause • You are trying to activate a version newer than you are allowed to, due to it not being a 'Supported' licence. Resolution • Renew your Annual Support and Software Assurance subscription for that licence.
Could not validate license "Standard Edition (IAS-[redacted])" in EstateMasterIA. Cannot run on this operating system.	Cause • You are trying to activate a User/PC Licence on a Server Resolution • Install and licence the software on a PC or Notebook not running a Server operating system. • Upgrade to a CAS Licence.
Could not activate license at server. Your subscription period has expired	Cause • Your Subscription Licence has expired Resolution • Contact Estate Master Support to renew your subscription.
Could not activate license at server. Your hardware has changed significantly and the product cannot activate. Please try again or call Estate Master for assistance.	Cause • The licence has already been activated on another different machine. • A previous deactivation did not update our online database to free up this licence. Resolution • If you think you have deactivated that licence previously and you are tying to activate it on a new machine, try and conduct an Offline Deactivation to reset our licence database.
Could not validate license "Network Edition (DFN-1T9QSP-M0KWV-C1TML-HUHY1-1J32L-27TPP)" in C:\Program Files\Estate Master\DF5\LicenseDF_v5.lic. This application requires the Estate Master Network server to be running on your network. This was not found.	Cause • You are trying to register a Client-Server CAS licence and the client machine connect communicate with the Network Licence Server. Resolution • Refer to the Licence Server Troubleshooting Errors

Any errors that occur during registration/activation are also logged in the Windows 'Application' Event Viewer.



Reporting Issues to Estate Master Support

If you require assistance with troubleshooting any issues during the registration and activation

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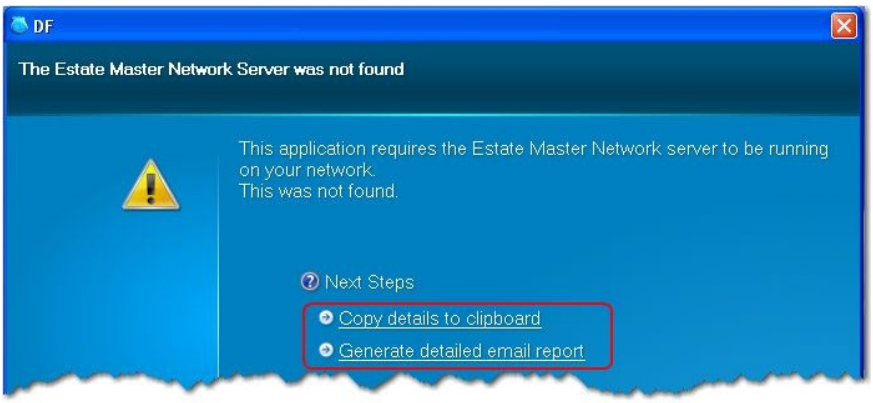
process, it is recommended that you email a copy of the full error report to Estate Master. To do this, either:

1. Click on [Copy details to clipboard], and then paste the contents in email message and send to support@estatemaster.com, or
2. Click on [Generate detailed email report], which will attempt to open your default email program (e.g. Outlook) and populate a new message with the error details.

DF
Errors connecting to the server.
Details
Assemblies
System Info
Could not register license.
Could not register with the server.
Cannot match the Serial Number with the specified Client ID. Please try again or call Estate Master for assistance.
Next Steps
Copy details to clipboard
Generate detailed email report


DF
The Estate Master Network Server was not found
This application requires the Estate Master Network server to be running on your network.
This was not found.
Next Steps
Copy details to clipboard
Generate detailed email report

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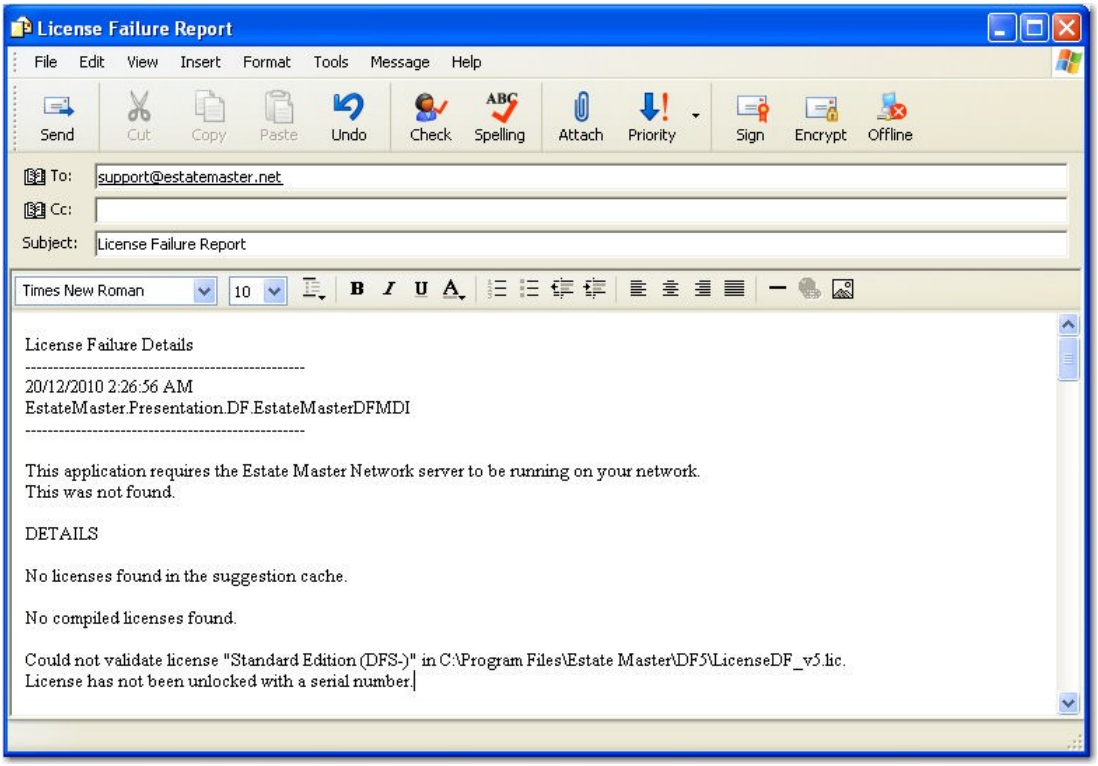
License Failure Report
File Edit View Insert Format Tools Message Help
Send Cut Copy Paste Undo Check Spelling Attach Priority Sign Encrypt Offline
To: support@estatemaster.net
Cc:
Subject: License Failure Report
Times New Roman 10
License Failure Details
20/12/2010 2:26:56 AM
EstateMaster.Presentation.DF.EstateMasterDFMDI
This application requires the Estate Master Network server to be running on your network.
This was not found.
DETAILS
No licenses found in the suggestion cache.
No compiled licenses found.
Could not validate license "Standard Edition (DFS-)" in C:\Program Files\Estate Master\DF5\LicenseDF_v5.lic.
License has not been unlocked with a serial number.

4.2 Deactivation (Moving Licences)

Since licences are 'locked' to a specific machine once they have been activated, deactivation will allow you to 'unlock' it and transfer it from one machine to another.

Important Note: You will need to run the Estate Master software on the machine that the original licence was a activated on to be able to complete the online deactivation process. If this machine is not available (e.g. it is damaged, has been stolen, etc), or you are unable to run the Estate Master software on it, then you will need to contact an Estate Master Support consultant to assist you with deactivating the licence.

To deactivate an activated licence, follow these steps:

1. On the machine that currently has the activated licence, open the Estate Master software that you wish to deactivate the licence for.
2. Go to the Application Menu and select [Help] > [About Estate Master <*product name*>]

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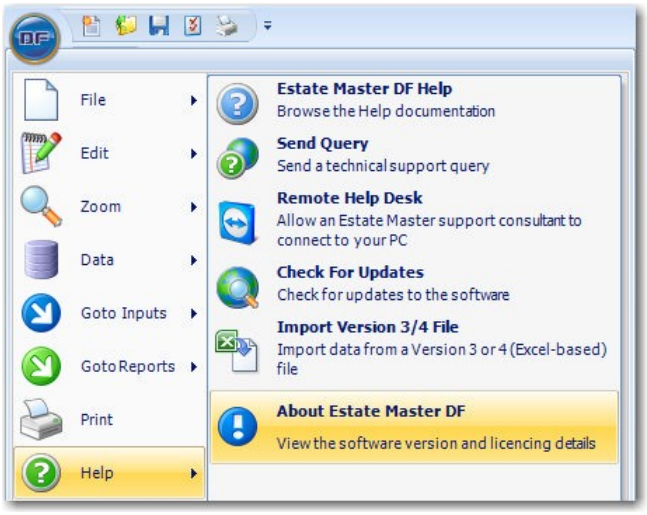
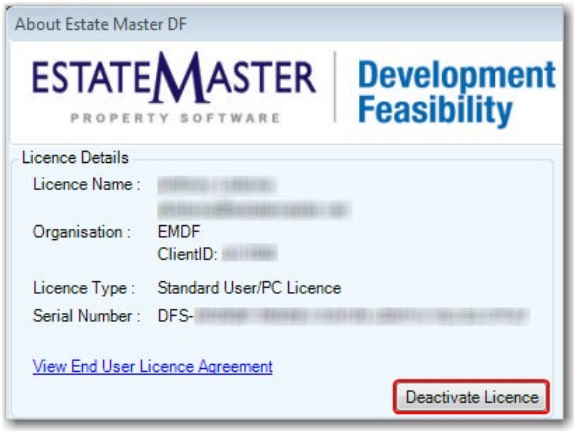


3. The following screen will appear that displays the existing licence details. Take note of the 'Serial Number' displayed on this screen, as it can be used to activate the licence on another machine. Click on the [Deactivate Licence] button



4. A new deactivation form will appear warning you what will happen next. You will need a valid internet connection to deactivate the licence. Click on the [Deactivate] button.

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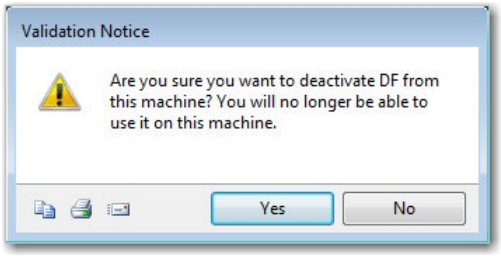
DF
ESTATEMASTER
PROPERTY SOFTWARE
Deactivate Your Software
Deactivating will permit you to install DF on a different machine. You do not need to de-activate to re-install on the same machine if you have not changed any of the hardware. Once deactivated you will no longer be able to use DF on this machine.
During deactivation an attempt will be made to notify the license server so you can automatically activate on the new machine.
WARNING: Deactivating your license from this machine may prevent you from re-installing the software on this machine. Please consult your licensing agreement for license usage and restrictions before continuing.
Get Help
License Agreement
More about Activation
Deactivate
Cancel

5. A confirmation message will appear. If you still wish to deactivate the licence, click [Yes].


Validation Notice
Are you sure you want to deactivate DF from this machine? You will no longer be able to use it on this machine.
Yes
No

6. The software will then attempt to contact the online licensing server. If it cannot contact the online licensing server, you will need to follow the 'Offline Deactivation' process.

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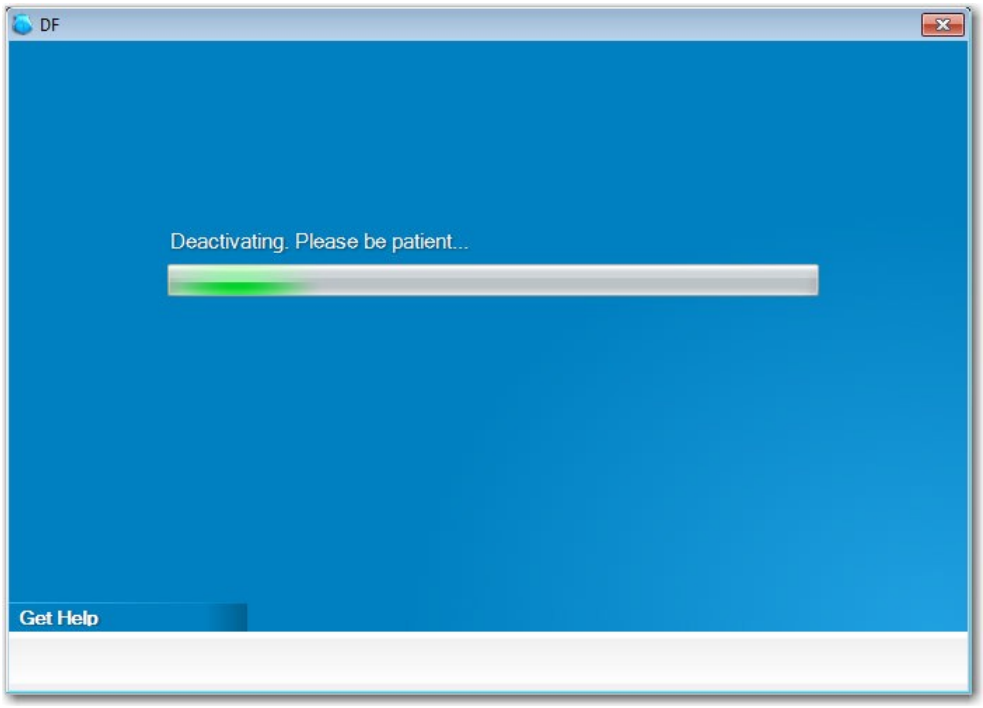
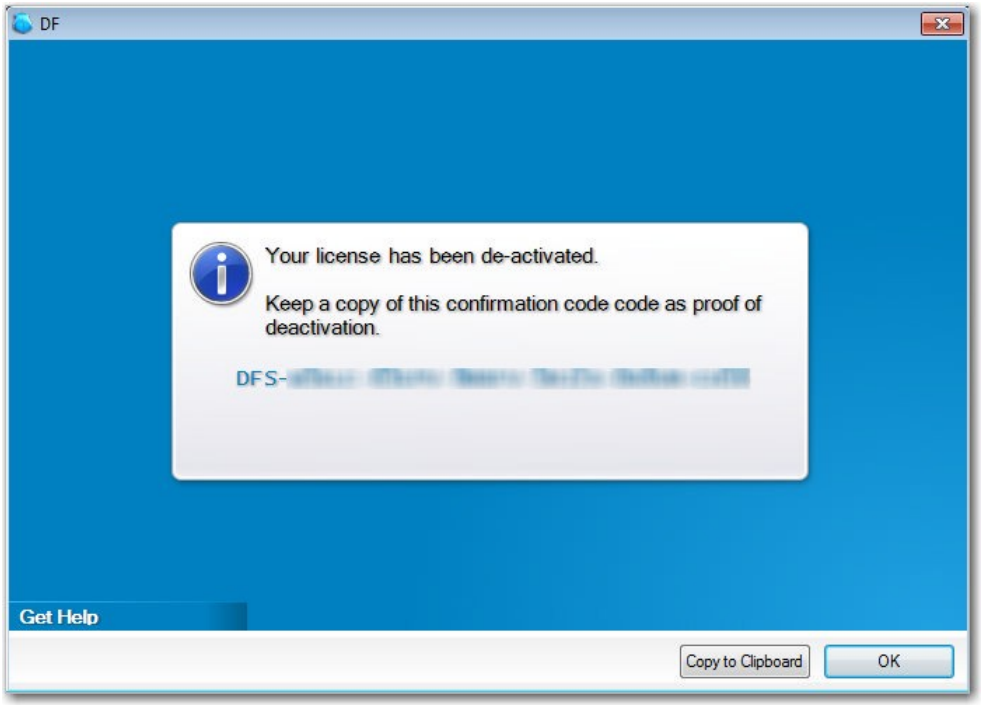


7. If successful, the following message will appear. Please take note of the confirmation code just in case you need to conduct an 'Offline Deactivation'. Click [OK].



8. Click [OK] and it will be confirmed that the licence has been deactivated from the machine. At this point the software will shut down and it is now ready to activate the licence on another machine using the original serial number provided.

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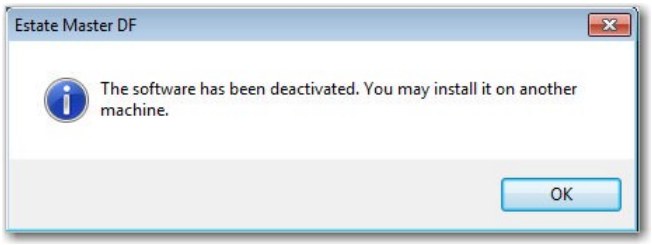


Important Note: Once a licence has been deactivated from a machine for a specific product, if at any stage in the future the software needs to be re-activated again on that machine, the software will need to be reinstalled

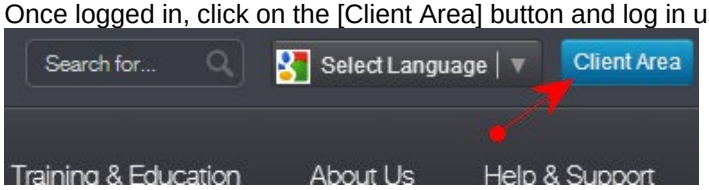
4.2.1 Offline Deactivation

The deactivation process requires access to the machine that the original licence was a activated on, and an internet connection to authorise the deactivation online. If an internet connection is not available, then the licence will be deactivated from the machine, but our online licence database will not be updated. Therefore you will not be able to reuse this licence on another machine until you complete the following process:

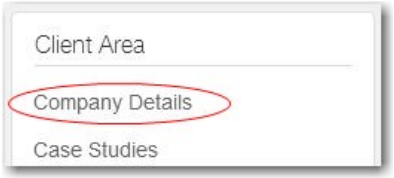
Important Note: Once you deactivate a license in an 'Offline' manner, you will be unable to reuse that Serial Number again unless you activate 'Online'.

Go to the Estate Master website www.estatemaster.com

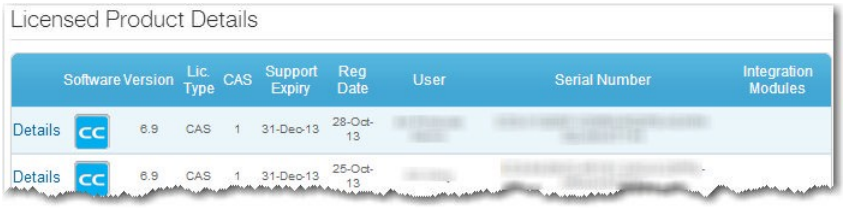
1. Once logged in, click on the [Client Area] button and log in using your Client ID and Password.



2. In the navigation menu, click on [Company Details]



3. Scroll to the the 'Licensed Product Details' table, and select the license that you wish to obtain an offline activation code for by clicking on the [Details] button.



1. The details for that particular license will be displayed in a table. Below the table, click [+] to expand and display the 'Offline Deactivation Code' information.

2. It will display a mock-up of the deactivation screen (as per screenshot below).

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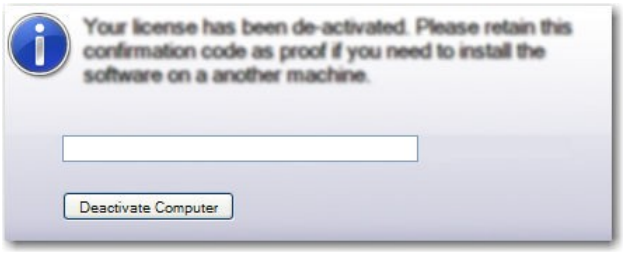
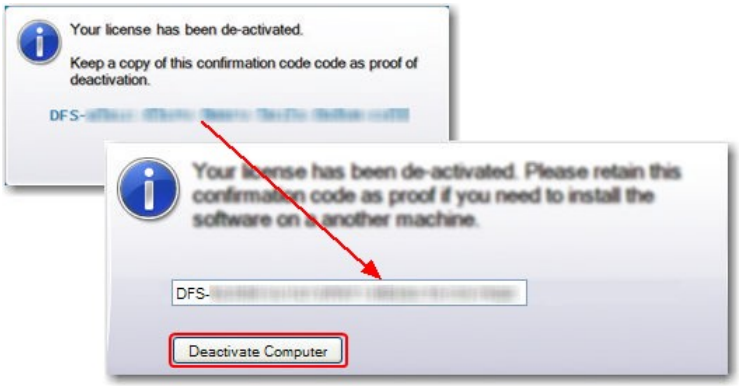
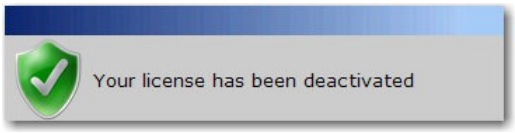
Important Note: Before proceeding further, please ensure that you are deactivating the correct licence.


Your license has been de-activated. Please retain this confirmation code as proof if you need to install the software on a another machine.
Deactivate Computer

3. Enter the Confirmation Code that was originally supplied when deactivating the software. This unique code ensures that the licence you are trying to deactivate matches the code supplied, ensuring that the incorrect licence or the incorrect machine is not accidently deactivated. Click on [Deactivate Computer]


Your license has been de-activated.
Keep a copy of this confirmation code code as proof of deactivation.
Your license has been de-activated. Please retain this confirmation code as proof if you need to install the software on a another machine.
DFS-
Deactivate Computer

4. If successful, the following message will appear. It is now ready to activate the licence on another machine using the original serial number provided.



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Part V

5 The Network Licence Server

5.1 Registration and Activation

When using Client-Server (Floating) CAS Licences for any of the Estate Master products, the Network Licence Server that controls the concurrent use of the different Estate Master licences needs to be installed and its licence activated on a single machine on the network. Until successful activation, the Network Licence Server service will not 'Start', and the Client-Server (Floating) CAS Licences cannot be utilised by client machines.

Important Note: Do not attempt to install or operate the Estate Master software on the client machines until the Network Licence Server has been correctly installed, activated and 'started' on the network.

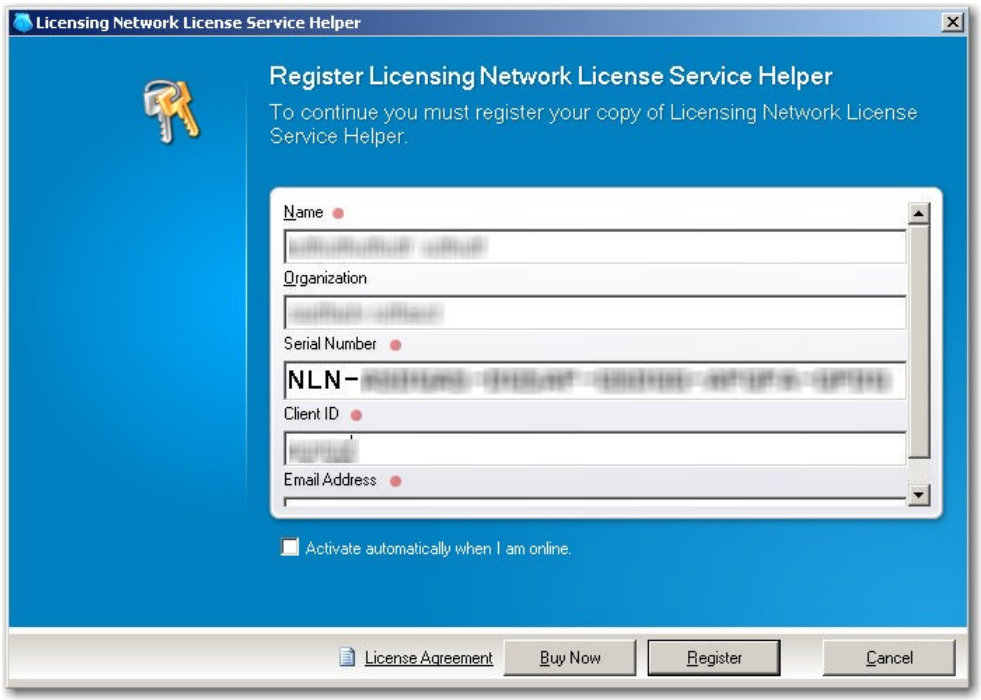
Internet Connectivity Requirements

- During the 'registration' process, it will also attempt to verify the serial number with the Estate Master Online Licence Database and then 'activate' the licence.
- An outbound connection needs to be made to the following URL to confirm the licence: http://clients.estatemaster.net:80/webservices/
- There is no 'offline' activation option for the Licence Server - it must be able to communicate with the Estate Master Online Licence Database at all times.

How to Register and Activate the Network Licence Server

During the installation process of the Network Licence Server, the registration form to activate the Network Licence Server will automatically appear. If you have the registration details available, enter them in the form and click on [Register].

Important Note: When activating a licence for a Network Licence Server, the Serial Number used should start with '**NLN'.**



Hint: For faster activation, select 'Activate Automatically when I am online'

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Alternatively, click on [Cancel] and complete the process later. However, until you do register Network Licence Server, none of the Client machines will able to be registered.

To load the registration form at a later time go to Windows Start > Programs > Estate Master > Network License Server > Registration

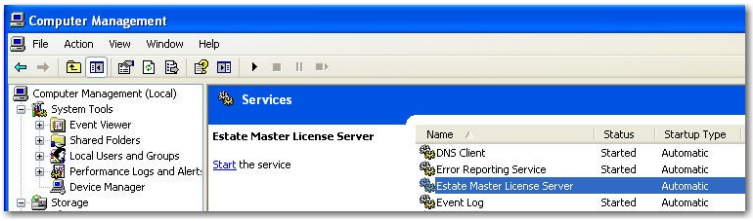
5.2 Starting the Licence Server

Once the Network Licence Server has had its licence activated, the service can be 'Started' so it can:

1. Communicate with the Estate Master Online Licence Database to fetch the Client-Server (Floating) CAS Licences the client has purchased.
2. Begin to control the Estate Master software usage across the network.

Starting the service is done either via the Network Monitor application or the Windows Computer Management console.

Using the Network Monitor to start the service



Using Windows Computer Management Console to start the service

Service Fails to Start

To ensure that the Client-Server (Floating) CAS Licences are always up-to-date, the Network Licence Server service needs to frequently communicate with the Estate Master Online Licence Database. It does this by using the default proxy information that has been set in Internet Explorer. If the Network Licence Server service service fails to start, one of the reasons may be that user account that the Network Licence Server service is running under does not have proxy permissions set, therefore the communication is being blocked. To rectify this issue, follow these steps to change the account that the Network Licence Server service is being run under.

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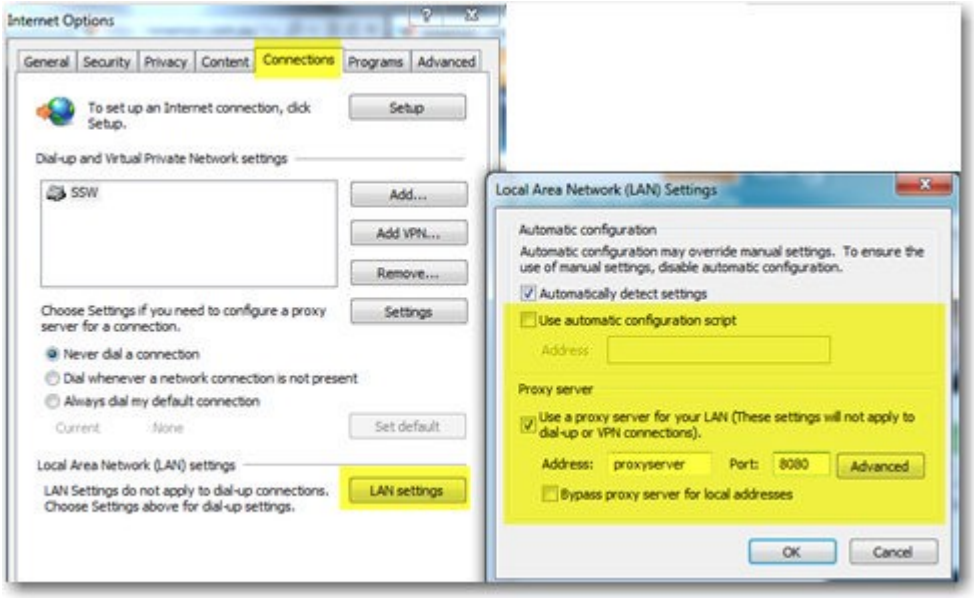
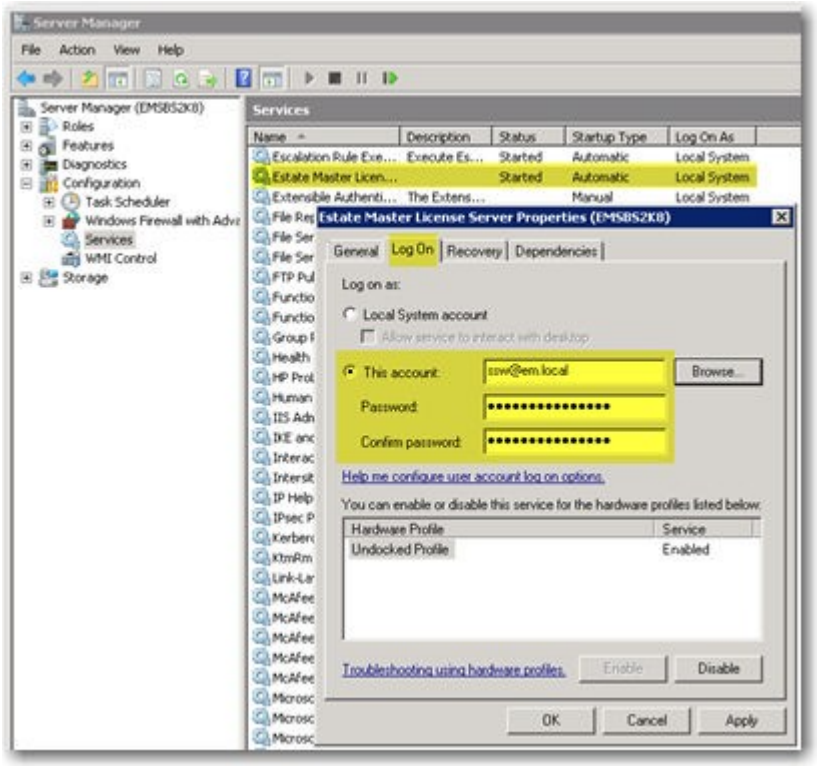
1. Login to the server (the machine running the Network Licence Server service) as a user who has proxy permissions.
2. Make sure the proxy information has been set in Internet Explorer and ensure they can browse the web.



3. Logout as this user.
4. Login as an Administrator.
5. Change the account that the Estate Master License Server" service runs as to the same user as in Step 1.



6. Try and start the Service

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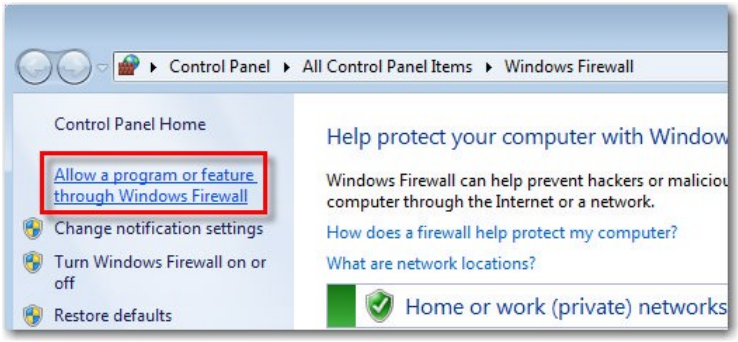
5.3 Detection Requirements

Client computers will attempt to locate the machine running the Network License Server by sending a UDP broadcast across the network on a particular port (11000 by default). The Server will hear this request and reply with the TCP connection information for the Client to continue communication on. Below is a summary of the ports that the application needs access to on both the client machines and the machine running the Network License Server.

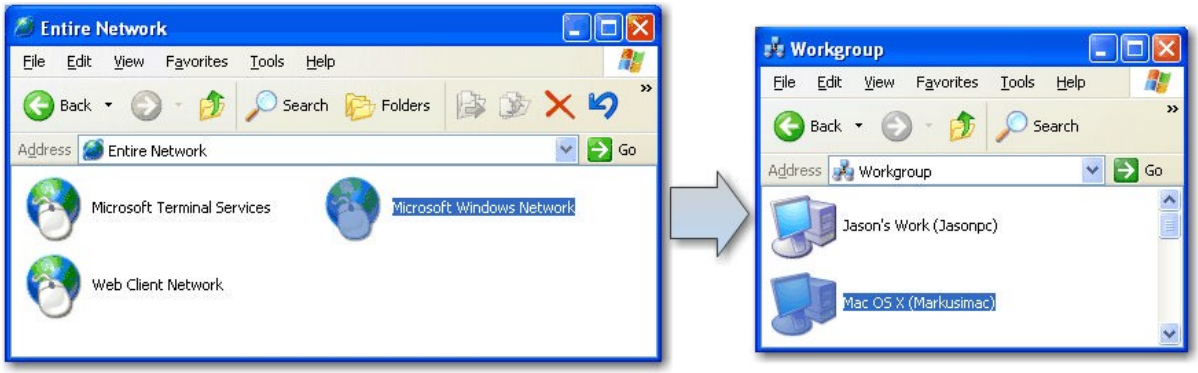
	Client Machines	Network Licence Server
Client Location Listener	UDP 11000	UDP 11000
Server Communications	TCP *random port*	TCP 12000

The UDP is an unreliable low-overhead protocol. It is also given lower priority though some routers and can also possibly be dropped if the router is too busy. In this rare case, restart the application (e. g. DF, DM) to attempt to locate the server again.

The Windows Firewall (or other corporate firewalls) will also stop these packets. You need to add the Estate Master application (e.g. DF, DM) and the above ports into the “Allow a program or feature through Windows Firewall”. This can be done at a corporate level through Group Policy.


Control Panel ▸ All Control Panel Items ▸ Windows Firewall
Control Panel Home
Allow a program or feature through Windows Firewall
Change notification settings
Turn Windows Firewall on or off
Restore defaults
Help protect your computer with Window
Windows Firewall can help prevent hackers or maliciou
computer through the Internet or a network.
How does a firewall help protect my computer?
What are network locations?
Home or work (private) networks

As a rule of thumb, server detection should be possible if you can see other computers on your network (including the machine that has the Network License Server running) though Windows 'My Network Places'.



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Server not Detected

If the Client computer was unable to detect the Network License Server, either during initial registration or on startup, the user will get this message: "The Estate Master Network Server was not found."

DF
The Estate Master Network Server was not found
This application requires the Estate Master Network server to be running on your network.
This was not found.

If it is believed that the Network License Server is on the network, there are several ways to troubleshoot this issue:

1. Go to the machine that has the Network License Server installed and check that it is 'running'. This can be done either via the Network Monitor application or the 'Services' component in the Windows Computer Management console. If it was 'stopped', restart the service and try and use the Estate Master software on the client machine again.
2. Make sure Windows Firewall or any other third-party firewall software on the client machine has the Estate Master applications and TCP/UDP ports noted above added to the 'Exception List' so it doesn't block any traffic between it and the server.
3. Check to see if their are any VMWare Virtual Network Adaptors installed on the client machine and disable them. These have been found to interfere with the detection process.

Manually Defining the Licence Server Location

If there are any other network configurations (e.g. firewalls, routers, etc) that may be blocking the licence server detection, a 'Licence Server Finder' utility is available to manually specify the IP address of the licence server. It can be downloaded from here: Licence Server Finder Download

Run the utility on the client machine:

1. Click [Find Licence Server]
2. It will attempt to find the Licence Server using the standard detection process.
3. If a Licence Server is found, it's IP address will be listed in the 'Found Servers' list.
4. If more than one Licence Server is found, a warning will appear - only one Licence Server can exist on the network.
5. If it cannot find a Licence Server, it will prompt the user to specify the IP address of the machine that IT is deemed to be running on.

The Estate Master Network Licence Server was not found
The Estate Master Network Licence Server was not found on your network.
Would you like to specify the server's IP?
Yes
No

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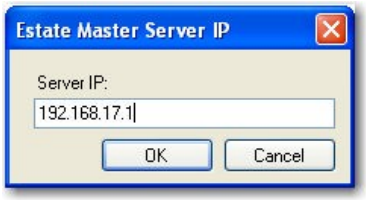

6. Once the IP address has been entered, it will save the settings to a configuration file, and alert the user where that file is saved.

7. The Estate Master software on the client machine will then communicate with the Licence Server using these settings. If there are other client machines that have the same issue, this configuration file can be copied to the same locations on these machines.

Important Note: Since you are manually setting the IP address of the Licence Server in these instances, if you ever move the Licence Server to a different machine with a different IP address, these configuration files will need to be updated for the client machines that have had the Licence Server IP address manually defined.

Manually Defining the Licence Server IP Addresses

In some circumstances, the machine that the Network License Server is running may have more than one IP Addresses allocated to it (ethernet IP's, VPN IP's, etc). This is evident when a different IP address is displayed each time the Network License Server is stopped/restarted via the Network Monitor.

Whenever the Network License Server is started, it will bind to the first IP it detects (on any interface) which can therefore change if the server has multiple IP's. This can be problematic, especially if the client machines have had the Licence Server location manually defined.

The resolution to this is to specify a static IP address in the Network License Server configuration file:

1. Go to the machine that the Network License Server is installed on.
2. Determine what the main permanent IP address of this machine from your IT Administrator.
3. Browse to the Network License Server program files folder. By default, it is: C:\Program Files\Estate Master\NetworkServer
4. Open the file *NetworkService.exe.config* in Notepad
5. Enter in the IP address in the UserServerIP key, e.g. <add key="UseServerIp" value="enter your IP address here" />
6. Save the file and restart the Network License Server.

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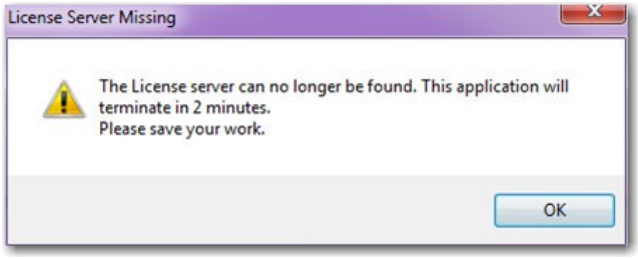
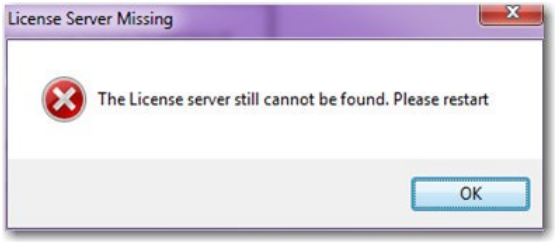
Disconnection from Server

After the Client computer has successfully connected to the License Server (the user has the Estate Master software running), there may be an instance where the server becomes unavailable for a temporary period. (e.g. server reboot, service stopped, network disconnected from computer, etc)

If the License Server cannot be contacted by the Client computer for 2 minutes, the user will get the following warning message:


License Server Missing
The License server can no longer be found. This application will terminate in 2 minutes.
Please save your work.
OK

The Client computer will continue to try and contact the License Server. If the License Server still cannot be found after a further 2 minutes then Estate Master software will need to be restarted by pressing [OK]. The user is given 1 minute to press [OK], until the software is automatically terminated (therefore a total of 5 minutes without contact with the License Server).



5.4 Monitoring Licence Usage

The Network Monitor is the user-interface for the Network Licence Server. This utility allows you to stop/start the Network Licence Server service, see who is actually using the software on the network and check how many available licences for each product there are.

The Network Monitor can also be installed on other machines (in addition to the machine that has the Network Licence Server service running on it) if you wish to monitor Estate Master licence usage from several locations. When it starts, it will automatically detect the server (the machine where the Estate Master Licence Server service is running).

It can be opened from Windows Start > Programs > Estate Master > Network License Server > Network Monitor

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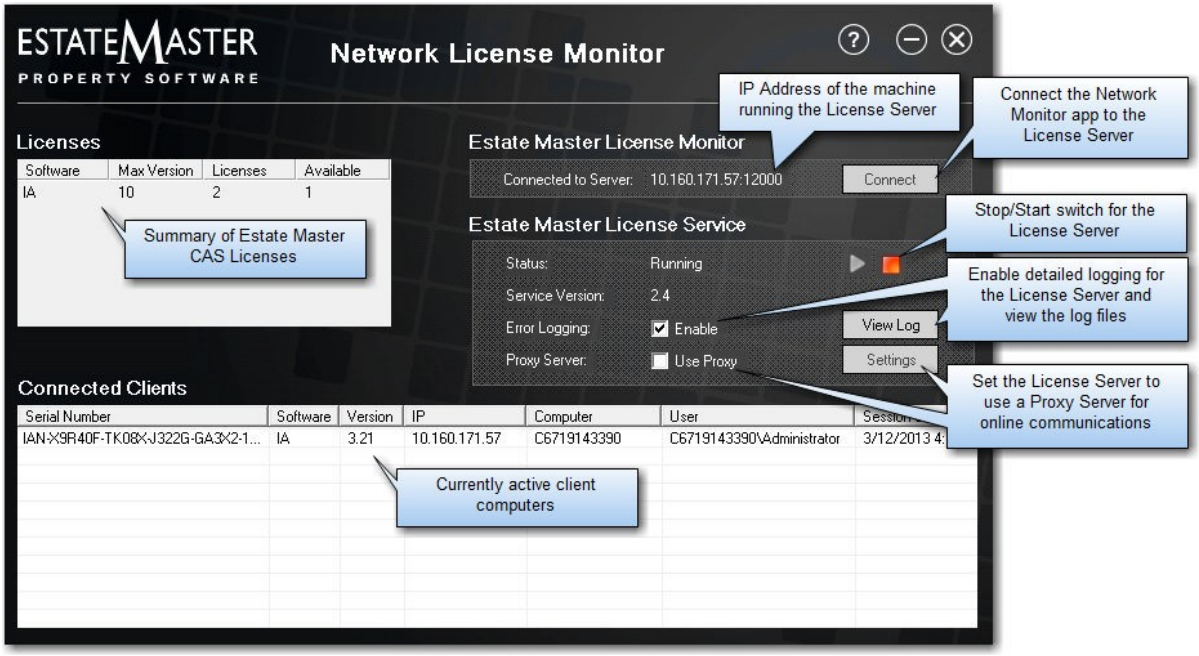
The Network Monitor will then load as follows:



Please Note:

- If the Network Licence Server service is running on the same machine as the Network Monitor, you will see the “Estate Master License Service” and "Error Logging" sections and you will have the ability to stop and start the service. If the Network Monitor is on a different machine to the service, then these sections are hidden.
- You are able to restart the service while people are connected to the Estate Master software and this will not cause anyone to stop working. The service can be stopped for a maximum of 5 minutes before clients will be forced to close their application (for example, just in case a server needs a reboot).

No More Available Licences

When all the licenses for a particular Estate Master product have been assigned by the Licence Server and then another Client computer attempts to start the software, the user will then get the following message:

"You have reached the maximum allowable concurrent network connections"

Estate Master Registration
You have reached the maximum allowable concurrent network connections
Contact Estate Master to resolve this issue
If you have reached the maximum allowable concurrent network connections for the Estate Master Application, you will need to wait for another user to close the Estate Master Application before you can use it again.
OK

The options available to the user to resolve the issue are:

1. Wait for another Client computer to close their Estate Master session and free up a licence. There is a delay of 2 minutes between when a Client computer ends their session and the licence becomes available.
2. Purchase additional licences.

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5.5 Updating Licences

The Network License Server automatically checks online for any updates to the Estate Master product licences:

1. Every time the Network License Server service is manually started.
2. Every 3 days (where the service is automatically restarted)

If any updates are found, the Network License Server will silently download the new licences. A notification will only be given if there is an error updating the licences.

Important Note: If the Network License Server fails to conduct a check after 10 attempts, then it will fail to start.

Modifying the Number of Concurrent Sessions (CAS)

If you wish to downgrade or upgrade the number of Concurrent Access Sessions (CAS) for your Client-Server Licensing, you will need to follow these steps:

1. Contact Estate Master Sales and make your request to either increase or decrease the number of CAS you own.
2. Once the request has been processed and any invoices paid, 'Stop' and then 'Start' the Network Licence Server service. This is done either via the Network Monitor application or the Windows Computer Management console.

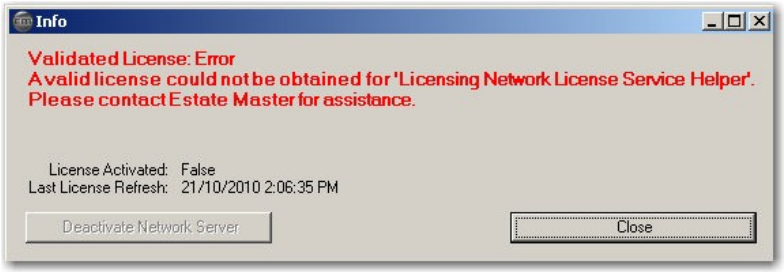
3. The Network Licence Server will then be updated with the correct CAS quantity.

5.6 Moving the Licence Server

If you wish to move the Network License Server from one machine to another, you will need to 'deactivate' the license first from the original machine, before attempting to 'activate' on the new one.

Before deactivating a Network License Server licence:

1. Use the Network Monitor to check that no user is currently running the Estate Master software. If they are, get them to exit the software to avoid any unexpected termination.
2. Using the Network Monitor, make sure the Network License Server service is stopped. Once stopped, make sure the Network Monitor application is closed. If the service is still running or the Network Monitor application is open when you attempt to 'deactivate' the licence, the registration form will appear and the following message will be shown:


Info
Validated License: Error
A valid license could not be obtained for 'Licensing Network License Service Helper'.
Please contact Estate Master for assistance.
License Activated: False
Last License Refresh: 21/10/2010 2:06:35 PM
Deactivate Network Server
Close

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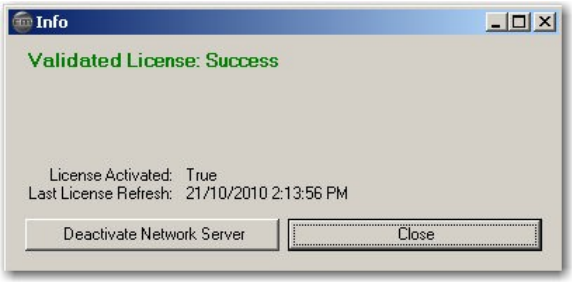
To deactivate a Network License Server licence:

1. Go to Windows Start > Programs > Estate Master > Network License Server > Registration

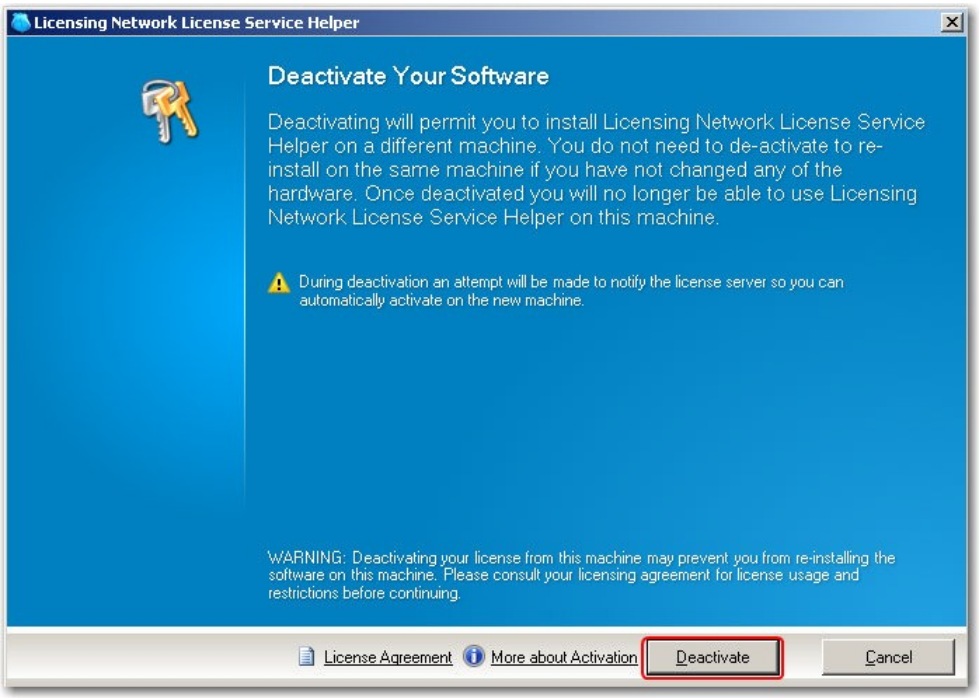
2. The following form is then displayed. Click on [Deactivate Network Server]



If that form does not appear, then the reasons could be:

- The Network Monitor application is still open, or
- The Network License Server service is still running, or
- The Network License Server licence was never activated in the first place.

3. The registration form will then appear to confirm the deactivation process. To proceed, click [Deactivate]


Licensing Network License Service Helper
Deactivate Your Software
Deactivating will permit you to install Licensing Network License Service Helper on a different machine. You do not need to de-activate to re-install on the same machine if you have not changed any of the hardware. Once deactivated you will no longer be able to use Licensing Network License Service Helper on this machine.
During deactivation an attempt will be made to notify the license server so you can automatically activate on the new machine.
WARNING: Deactivating your license from this machine may prevent you from re-installing the software on this machine. Please consult your licensing agreement for license usage and restrictions before continuing.
License Agreement
More about Activation
Deactivate
Cancel

4. A confirmation message will appear. If you still wish to deactivate the licence, click [Yes].

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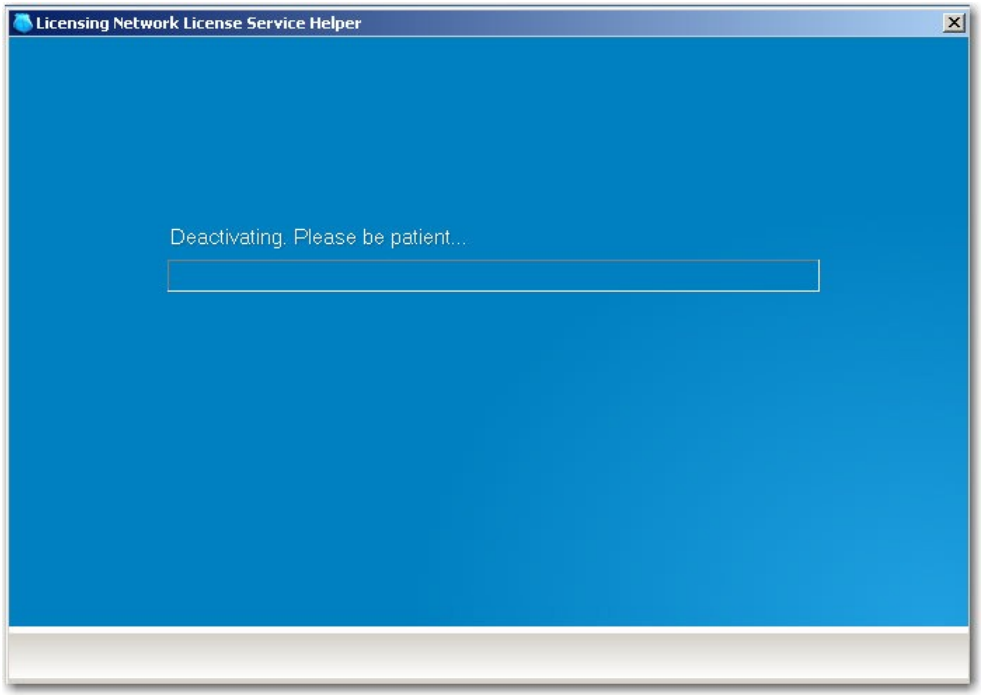
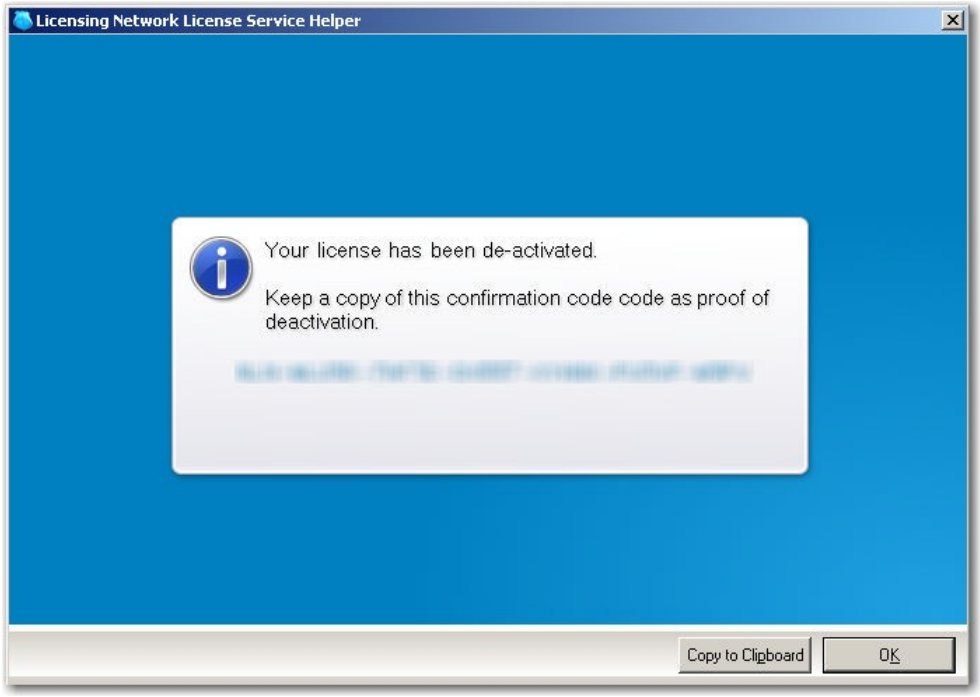
Validation Notice
Are you sure you want to deactivate Licensing Network License Service Helper from this machine? You will no longer be able to use it on this machine.
Yes
No

5. The software will then attempt to contact the online licensing server.



6. If successful, the following message will appear. Please take note of the confirmation code just in case you need it. Click [OK].


Licensing Network License Service Helper
Your license has been de-activated.
Keep a copy of this confirmation code code as proof of deactivation.
Copy to Clipboard
OK

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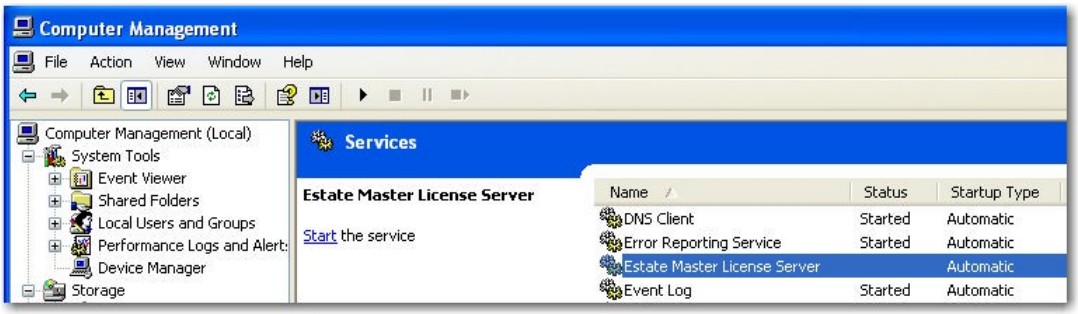
7. Click [OK] and it will be confirmed that the licence has been deactivated from the machine.

8. It is now ready to install the Network License Server on another machine and activate the licence using the original serial number provided.
9. Remember to 'Restart' the service on the new machine once the Network License Server has been reinstalled. This is done either via the Network Monitor application or Windows Computer Management console.



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Part

6 Technical Support

For further assistance in installing and registering Estate Master, please contact an Estate Master consultant.

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